REQUISITION ENTRY: OPEN PURCHASE ORDER   (2021.5)   09/02/22

(This includes additional instructions for Transition orders only. See last two pages.)

(Use **CAPITAL LETTERS** and **TAB** to maneuver through screens)

1) Select **Add** on the <u>Main Header Screen</u>– Your 3-digit Site code will default in the **Dept/Loc** field.
2) **TAB** to the **Requisition Number** field for your new req. #. Write it down for future reference.
3) **General Commodity** - Type **300** and **TAB**. The **General Description** will self-populate.

4) **PO Expiration** – enter 0**6/30/2023**
5) **UNCHECK Three Way Match**

Close	Search	Browse	Add	Update	Delete	Output	Print	Display	PDF	Save	ReadyForms	ReadyForms Delivery Definitions	Email	Schedule	Attach 0		Switch Form	Line Items	Release

Requisition Entry [TEST DATABASE Jul 17 2022]

Main   Terms/Miscellaneous

Main Information

Dept/Loc *	650	...	31-35 PURCHASING	
Fiscal year *	2023	○ Current ● Next		
Requisition number *	212184			
General commodity	300	...	OPEN PO OR MAINT AGREEMENT	
General description	OPEN PO OR MAINT AGREEMENT			

□ General Notes

Status	2	Created	
Needed by			
Entered *	08/30/2022	By	TracyOgle
Convert to	Purchase Order ▼		
PO expiration	06/30/2023		
Receive by	● Quantity ○ Amount		

☐ Three way match required
☐ Inspection required   By
☐ Project accounts applied

Vendor Information

Vendor	360315 ... 🟧	☐ Committed
Name	ODP BUSINESS SOLUTIONS LLC	
PO mailing	0	
	6600 NORTH MILITARY TRAIL	
	BOCA RATON	FL 33496
Delivery method	☑ Print ☐ Fax ☐ E-Mail	
Remit	1 ... 🟧 ODP BUSINESS SOLUTIONS LLC	

□ Vendor/Sourcing Notes   □ Vendor Quotes (0)

Shipping Information

Ship to *	OP ...
	OPEN PURCHASE ORDER
Email	X79482
Reference	PURCHASING/GOSS/OGLE

6) Enter **Vendor ID #** or click on the
   Elipse Button (3 dots) to look up vendor.

7) **TAB** to **Ship To**: Enter **OP**
8) **Email**: Enter **your phone extension**
9) **Reference:** Enter **Site/Location on site/Your Name**
10) Select **Vendor Sourcing Notes**

← Back | + Add | ✏️ Update | 🗑️ Delete | Ⓟ Print On PO | Ⓘ Import

Requisition Entry [TEST DATABASE Jul 17 2022] > Vendor Sourcing Notes

Note

Requisition

Date/Time

Created By

− Print on PO.

11) Select **Import**   12) **Highlight OP**   13) **Accept**   14) **Back**

← Back | ✓ Accept | ⊗ Cancel | → Output | 🖨️ Print | 👁️ Display | PDF | 💾 Save | ↓ Excel | 📄 Word

Requisition Entry [TEST DATABASE Jul 17 2022] > Vendor Sourcing Notes > Requisition Notes

Type	Number	Dated	By User	↓ Description
Normal	11	04/26/2011	LeeannErrotabere	OP - - OPEN PURCHASE ORDER IN THE AMOUNT A
Normal	15	04/27/2011	LeeannErrotabere	ON * * * ORDER PLACED ONLINE - DO NOT
Normal	29114	07/23/2013	LeeannErrotabere	NO TAG ** NO ASSET TRACKING NEEDED -

15) Takes you back to the Main Header Screen. Select **Line Items**

✕ Close | 🔍 Search | 🏛️ Browse | + Add | ✏️ Update | 🗑️ Delete | → Output | 🖨️ Print | 👁️ Display | PDF | 💾 Save | 📄 ReadyForms | ⚙️ ReadyForms Delivery Definitions | ✉️ Email | 🕐 Schedule | 📎 Attach | Ⓢ Switch Form | Ⓛ Line Items | Ⓡ Release | Ⓐ Activate | Ⓜ Mass Allocate

Requisition Entry [TEST DATABASE Jul 17 2022]

16) Takes you to the <u>Line Item Screen</u>. (If it doesn't, select **Line Items**.**)**
17) **Quantity** :1
18) **Description**: Enter **short description of what you are buying, your site name, school year and authorized signers.**
19) **Unit Price**: Estimated $ amount for <u>entire school year</u>.   20) **UOM**: Enter **LOT**
21) Highlight **taxable field** and **use the space bar to remove tax.**

← Back   ✓ Accept   ⊗ Cancel

Requisition Entry [TEST DATABASE Jul 17 2022] > Line Items > ✎

Requisition

| Fiscal year | 2023 | Number | 212184 | Line | 1 |

Detail

Quantity *	1.00		Unit price	300.00000
Commodity		··· 📁	UOM *	LOT ···
Inventory item		··· 📁	Freight	.00
Location	···		Discount percent	.00
Type	○ Pick ticket		Taxable amount	0.00 ▦
	○ Purchase		Sales tax amount	0.00
Product ID		···	Credit	.00
			Line item total	300.00
			Amount justification:	UNKNOWN

Description *
OFFICE SUPPLIES.
SIGNERS: ERIN GOSSWILLER, TRACY OGLE.
PURCHASING 22-23 SY.

1099 box   [▼]

Seq	T	Account	Description	Amount	GL Bud
01	Expense ▼	430008-650-0000-0650-7530-0000-0-60001- -01 ···	SUP NON-CL UNRESTRICT PURCHAS	300.00	U

22) Enter **Budget String** or use **Ellipse Button (3 dots)** to locate budget.
                23) **TAB** to **Amount**. Verify both <u>$ amounts match</u> and **TAB AGAIN**.
                24) **Accept**   25) **Back**

← Back   ✓ Accept   ⊗ Cancel

Requisition Entry [TEST DATABASE Jul 17 2022] > Line Items > ✎

✕ Close 🔍 Search 🗏 Browse ➕ Add ✎ Update 🗑 Delete ➦ Output 🖨 Print 👁 Display 📄 PDF 💾 Save ▤ ReadyForms ⚙ ReadyForms Delivery Definitions ✉ Email 🕐 Schedule 📎 Attach ▾ Ⓢ Switch Form Ⓛ Line Items Ⓡ Release Ⓐ Activate

Requisition Entry [TEST DATABASE Jul 17 2022]

Main

26) Takes you back to the <u>Main Header Screen</u> - **Release.**

Munis

Would you like to continue with release of requisition?

[Yes]   [No]

27) **Yes**   28) **Yes**

Munis

Warning!
No Workflow Business Rule approval conditions were met.
No pending actions were created for this requisition.
Continuing with 'Release' will 'Approve' the requisition.

[Yes]   [No]
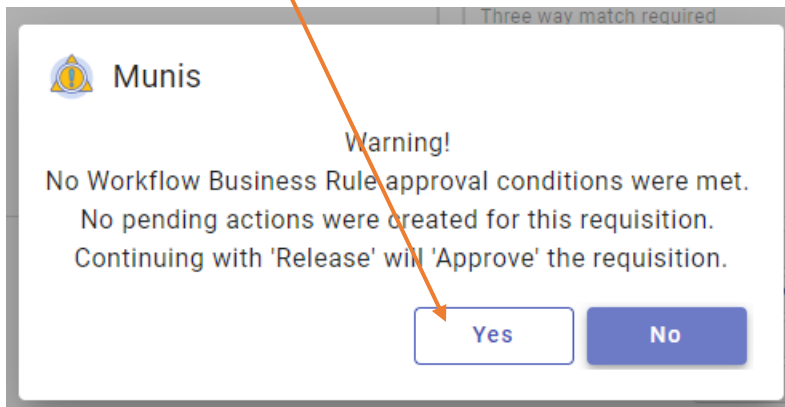
Requisition Entry [TEST DATABASE Jul 17 2022]

Main

Dept/Loc *	650	...	31-35 PURCHASING		Status	8	Approved
Fiscal year *	2023	○ Current ● Next			Needed by		
Requisition number *		212184			Entered *	08/30/2022	By
General commodity	300	...	OPEN PO OR MAINT AGREEMENT		Convert to	Purchase Order	

29) Verify **Status is 8 – Approved**. If **Status is 6 -Pending,** view **Approver Button** at bottom of screen. You will need to make next approver aware of pending status to avoid delays in PO processing.

📁 **Accounts**   Total amount   300.00

Workflow

[**My Approvals**]   [Approve]   [Reject]   [Forward]   [Hold]   [**Approvers**]

1 of 1 |<   <   >   >| Asterisk indicates that additional notes exist for the line item.

REQUISITION ENTRY: OPEN PURCHASE ORDER ADDITIONAL INSTRUCTIONS FOR TRANSITION ORDERS ONLY (2021.5)

REQUISITION ENTRY – UTILIZE GENERAL NOTES BOX FOR NEEDED TRANSITION TEAM ORDER JUSTIFICATION- WHEN GENERAL NOTES ARE ASSOCIATED WITH A REQUISITION, THE GENERAL NOTES FOLDER ON REQUISITION HEADER IS YELLOW

VENDOR SOURCING NOTES FIELD IS UTILIZED FOR CONSISTANT WORDING RELATED TO VARIOUS REQUISITIONS. THESE NOTES ARE MAINTAINED BY PURCHASING DEPT – SUCH AS OPEN PURCHASE ORDER LANGUAGE

WHEN PROCESSING OPEN PURCHASE ORDERS, TRANSITION STAFF COULD ADD INFORMATION RELATED TO MEETING SCHEDULES IN LINE ITEM DETAIL INSTEAD OF PROCESSING A REQUISITION FOR EACH MEETING

Confirm	Search	Actions	Output	Office	Tools	

Requisition

| Fiscal year | 2022 | Number | 201223 | Line | 1 |

Detail

Quantity	1.00		Unit price	1,000.00000
Commodity	[...] 📂		UOM	LOT [...]
Inventory item	[...] 📂		Freight	.00
Location	[...]		Discount percent	.00
Type	○ Pick ticket ○ Purchase		Taxable amount	1000.00 🔳
			Sales tax amount	0.00 Modify tax groups
Product ID	[...]		Credit	.00
			Line item total	1,000.00
			Amount justification:	UNKNOWN

Description:
```
TRANSITION TEAM AND PARENT MEETING SUPPLIES :
SIGNES JANE DOE & JOHN DOE
SCHEDULED MEETING DATES: 3/24/2022 & 4/17/2022
```

📂 Add'l Desc/Notes

Miscellaneous

Manufacturer			Bid	📂
Manufacturer item no.			Dept/Loc	650 [...] 31-35 PURCHASING
Vendor	99999 [...] VENDOR UNKNOWN		Required by	📅
PO mailing	0 [...]		Requested by	[...]
Delivery method	✓ Print		Receipt notification to	[...]
	☐ Fax		Fixed asset	N ▼
	☐ E-Mail		☐ Notify buyer	
	☐ E-Procurement			
Remit	1 [...] 📂 VENDOR UNKNOWN			

📂 Vendor/Sourcing Notes

| Vendor item no. | |
| 1099 box | ▼ |

Seq	PA Type	Project Account	T	Account
	▼		[...] ▼	[...]